

## Purpose

To outline the policies and procedures for department sponsored conventions, conferences, workshops, training sessions, retreats, etc. The basis for this is found in the Division of Finance policies **FIACCT 05-08.04, 05-08.05 & 05-08.06**.

## Policy

The Utah Department of Transportation will adhere to state policies when a division, office, or region (agency) is planning a conference for which the total costs are more than \$500.

## Background

**FIACCT 05-08.04 Selection of Sites and Services:** When state employees are the main participants in state sponsored conferences/conventions, the event must be held at facilities or locations within the borders of the state. Utah businesses and service providers are to be utilized.

**FIACCT 05-08.05 Hotel/Conference Room Accommodations:** The State Travel Office must arrange, book, and approve all hotel/conference room accommodations.

**FIACCT 05-08.06 Retreats:** This policy defines a retreat and sets the expenditure limits for facilities, travel, lodging, and etc.

## **Procedures**

### **Conference/Training Session**

**UDOT 02-55.1**

**Responsibility:** Agency

#### **Actions**

1. Fill out a Conference Request form. This form may be obtained from State Division of Finance (Travel Office). Submit the completed request to the Executive Director or his designee for approval.

**Responsibility:** Executive Director

2. Approve or deny the conference request. Return the form to the agency.

**Responsibility:** Agency

3. Submit the approved conference request to the Travel Office as described in state policy **FIACCT 05-08.05**.

**Responsibility:** Travel Office

4. Obtain bids based on information submitted by the agency. Submit bids to the requesting agency within 72 hours of receiving the request.

**Responsibility:** Agency

5. Review the bids obtained by the State Travel Office and work with them to select accommodations.

**Responsibility:** Travel Office

6. Approve the bid selected by the agency, and book the accommodations. Notify the agency that the arrangements have been made.

**Responsibility:** Agency

7. Upon receiving the Division of Finance Travel Office approval, the Agency will contact the State Accountant in the Comptroller's Office to obtain a job number and other accounting codes for the conference.
8. All revenue and expenditures will be charged to this job number. The Agency will be responsible to monitor all revenue and costs, and to make up any deficiency in funding for the conference.

**Responsibility:** State Accountant in the Comptroller's Office

9. Issue the job number and monitor expenditures to assure proper funding and costing. Close out job number at the completion of conference business cycle.